


Initial Assessment Contacts

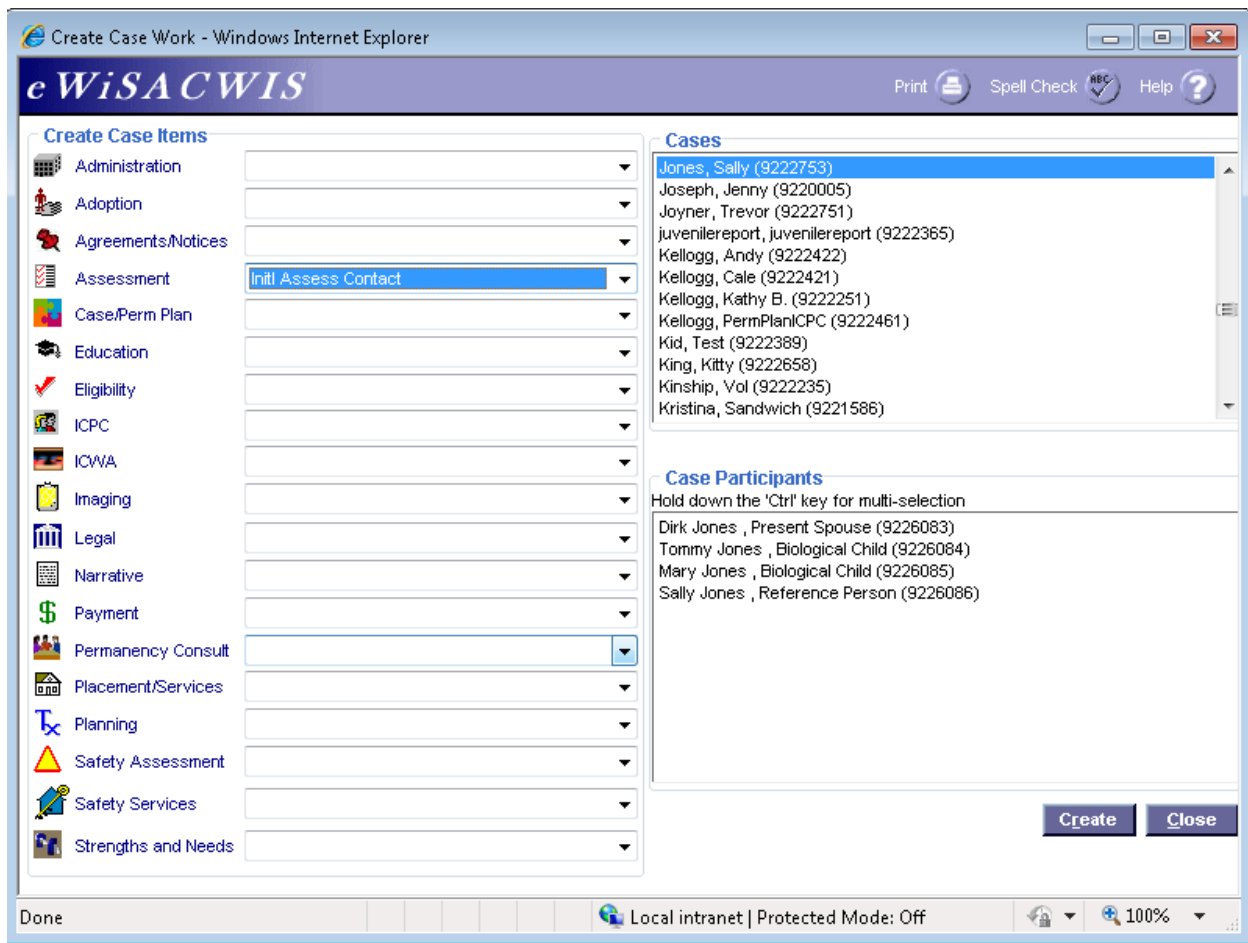
Note: In order to create a case note, an assignment to the case is not needed.

Creating Case Notes on Assigned Cases

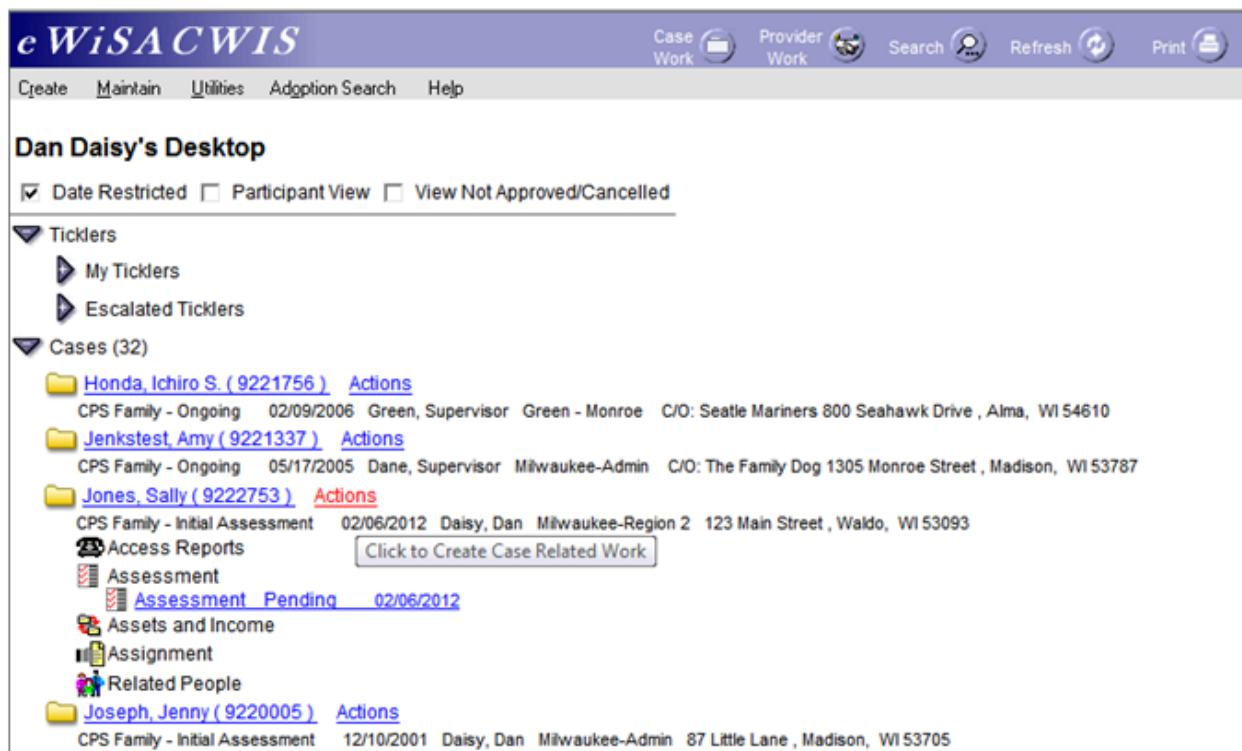
1. Create an initial assessment contact case note using one of two methods:

- a) From your desktop, click the Case Work hot button . This will open the Create Case Work page.

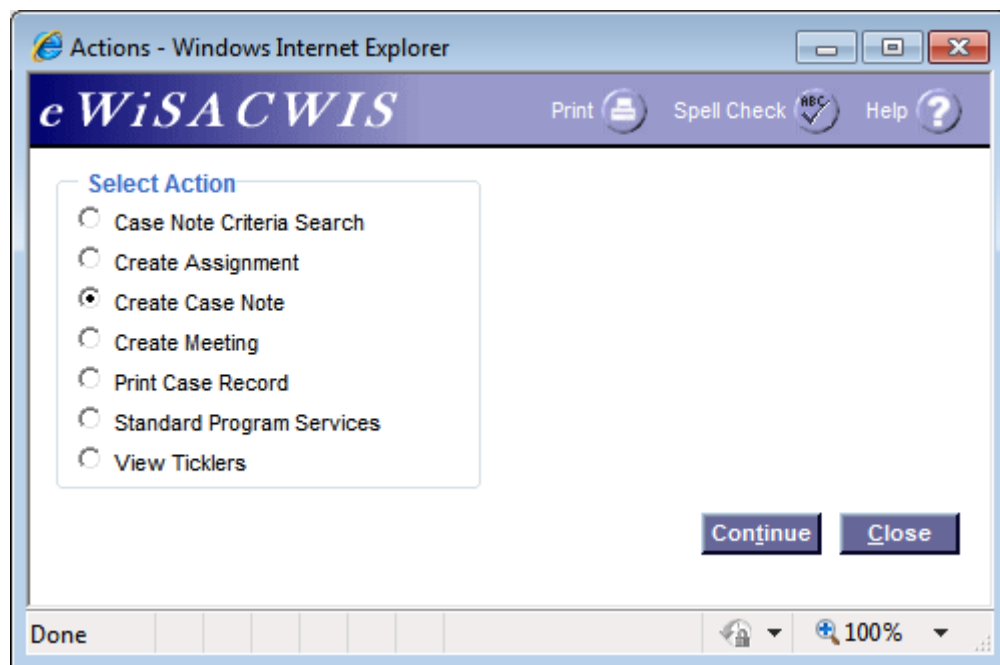
Select the Initl Assess Contact from the Assessment drop-down and select the Case. The selection of case participants is optional; use the 'ctrl' key to select more than one participant. If the contact is with someone who is not a participant with the case, do not select a name. Click Create. This will open the Case Notes page.



- b) From your desktop, click the Actions hyperlink next to your case. This will open the Actions page.



On the Actions page, select Create Case Note and click Continue. This will open the Case Notes page.



2. On the Case Notes page, the top of the page pre-fills with the Case Name, Worker Creating Note, Worker Making Contact, and Date Entered. There is an option to Search out the Worker Making Contact if it is not the same as the person entering the case note. The note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked, 30 days have passed, or the Assessment is approved by a supervisor, the note will be frozen and no longer editable.
3. In the Note Information group box, the Date and Begin Time are required user entered fields. Case Notes created via Create Casework will automatically pre-fill the Category and Type with Initl Assess Contact and Face-to-Face, respectively. If creating the Case Note via Actions, select these values on the Category and Type drop-downs.
4. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.
5. The Participants in the case, which includes case participants and collaterals, display on the right side. You can use 'Ctrl' key to multi-select additional participants.
6. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For case worker contact policy guidance, place your mouse over the 'Details.'
7. Notice the scroll bar to the right. The page is too big to display the entire contents. Use the scroll bar to view the bottom of the page.

The screenshot shows the 'eWiSACWIS' web application running in a Windows Internet Explorer browser. The page title is 'Case Notes - Windows Internet Explorer'. The application header includes the 'eWiSACWIS' logo and navigation links for 'Print', 'Spell Check', and 'Help'.

The main content area displays case information for 'Case: Jones, Sally (9222753)'. It includes fields for 'Worker Creating Note: Cake, Caitlin M.' and 'Worker Making Contact: Cake, Caitlin M.' with a 'Search' link. Below this, the 'Case Note ID: 9223452' and 'Date Entered: 02/06/2012 02:22 PM' are shown, along with checkboxes for 'Note Finalized' and 'Contact By Designee'.

The 'Note Information' section contains several fields:

- Date:** 02/06/2012
- Begin Time:** 01:00 (with AM/PM radio buttons)
- End Time:** 00:00 (with AM/PM radio buttons)
- Duration:** 0000.0
- Category:** Initl Assess Contact (dropdown)
- Type:** Initial Face-to-Face (dropdown)
- Type Detail:** (empty dropdown)
- Face-to-Face Location:** Home Visit (dropdown)
- Face-to-Face Result:** Occurred (dropdown)
- Billable:** (checkbox)
- View Inactive Participants:** (checkbox)

The 'Participants' section on the right lists several individuals:

- Jones, Dirk (Present Spouse)
- Jones, Mary (Bio Child)
- Jones, Robert (Bio Child)
- Jones, Sally (Reference Person) - highlighted in blue
- Jones, Tammy (Bio Child)
- Jones, Tommy (Bio Child)

 A note below the list states: 'Hold down the 'Ctrl' key for multi-selection' and includes an 'Add Contacts' link.

The 'Narrative' section at the bottom features a large text area for 'Enter narrative text here...' and a 'Details' link. Below the text area are links for 'More...', 'Less...', and 'Default'.

At the bottom of the form, there is an 'Options:' dropdown menu with a 'Go' button, and a row of action buttons: 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'.

The browser's status bar at the very bottom shows 'Done', 'Trusted sites | Protected Mode: Off', and a zoom level of '100%'.

8. Below the Narrative group box is an expando with Assessment Contact Information.

The Begin Date field is a drop-down value displaying the 'Date and Time Report was Received' for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered. The 'Add Contacts' hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

The screenshot shows a web browser window titled "Case Notes - Windows Internet Explorer" displaying the "eWiSACWIS" application. The interface includes a top navigation bar with "Print", "Spell Check", and "Help" links. Below this is a "Narrative" section with a text area for "Case Note 1/1" and a "Details" link. The "Assessment Contact Information" section is expanded, showing a "Begin Date" dropdown set to "02/03/2012 12:25 PM". A table lists two contacts: "Jones, Sally" and "Jones, Tommy", both with a contact date of "02/06/2012 01:00 PM" and "Delete" links. An "Insert" button is located below the table. At the bottom, there are buttons for "Options", "Go", "Insert Correction Note", "Clear Fields", "Create", "Save", and "Close". The browser status bar at the bottom indicates "Trusted sites" and "Protected Mode: Off".

Name	Affiliation	Title	Contact Date	
Jones, Sally			02/06/2012 01:00 PM	Delete
Jones, Tommy			02/06/2012 01:00 PM	Delete

9. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.

10. To create an Initial Assessment Contact from the Assessment, click on the pending Assessment from your desktop. This will open the Assessment page.

eWiSACWIS

Case Work Provider Work Search Refresh

Create Maintain Utilities Adoption Search Help

Dan Daisy's Desktop

☒ Date Restricted ☐ Participant View ☐ View Not Approved/Cancelled

Ticklers

Cases (32)

Harrison, Jenny (9221025) Actions
CPS Family - Ongoing 03/26/2003 Daisy, Dan Milwaukee-Admin 360 Circle Street, Milwaukee, WI 53212

Jones, Sally (9222753) Actions
CPS Family - Initial Assessment 02/06/2012 Daisy, Dan Milwaukee-Region 2 123 Main Street, Waldo, WI 53093

Access Reports

Assessment

Assessment Pending 02/06/2012

Assets and Income

Assignment

Related People

Click to Maintain Assessment

11. On the Assessment page, click on the Results tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.

Assessment - Windows Internet Explorer

eWiSACWIS

TM Print Spell Check Help

Assessment

Name: Jones, Sally Assessment ID: 9222036 Status: Open

Report

Response Time: Within 5 business days Date: 02/03/2012

Participants Basic Allegations Contacts **Results**

Assessment Results

Result: **Substantiated**

Disposition

Family RA Future A/N

Abuse Score:
Neglect Score:
Risk Level:

Safety Assessment

Safety Decision: Unsafe

Strengths and Needs

Needs Level:

Initial Face-to-Face Contact Information

Initial Face-to-Face Must Occur By: 02/10/2012 12:25 PM [CPS Report 9238179](#) [Create Initial Face-to-Face Contact Note](#)

Initial Face-to-Face Documented:

Options: Go Save Close

Done Trusted sites | Protected Mode: Off 100%

12. On the Case Note page, the Category and Type will pre-fill.

Case Notes -- Webpage Dialog

eWiSACWIS Print Spell Check ABC Help ?

Case: Jones, Sally (9222753) Worker Creating Note: Cake, Caitlin M. Worker Making Contact: Cake, Caitlin M. [Search](#)

Case Note ID: 9223452 Date Entered: 02/06/2012 02:22 PM ☐ Note Finalized ☐ Contact By Designee

Note Information

Date: 02/06/2012 Category: Initl Assess Contact ☐ View Inactive Participants

Begin Time: 01:00 AM PM Type: Initial Face-to-Face Participants:

End Time: 00:00 AM PM Type Detail: Face-to-Face Location: Home Visit Jones, Dirk (Present Spouse)

Duration: 0000.0 Face-to-Face Result: Occurred Jones, Mary (Bio Child)

☐ Billable Jones, Robert (Bio Child)

Jones, Sally (Reference Person)

Jones, Tammy (Bio Child)

Jones, Tommy (Bio Child)

Hold down the 'Ctrl' key for multi-selection

[Add Contacts](#)

Narrative

Case Note 1/1 [Details](#)

Enter narrative text here...

[More...](#) [Less...](#) [Default](#)

Options: [Go](#) [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

13. In the Note Information group box, enter the Date and Begin Time.

14. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.

15. The Participants in the case are shown on the right side. You can use 'Ctrl' key to multi-select additional participants.

16. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For case worker contact policy guidance, move your mouse over the 'Details' flair.

17. Scroll to the bottom of the page to update the Assessment Contact Information group box.

18. The Begin Date field is a drop-down value displaying the 'Date and Time Report was Received' for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered. The 'Add Contacts' hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

The screenshot shows the eWiSACWIS web application running in a Windows Internet Explorer browser. The page has a purple header with the eWiSACWIS logo and navigation links (Print, Spell Check, Help). Below the header, there is a section for 'Narrative' with a text area for 'Case Note 1/1' and a 'Details' link. Below the narrative section is the 'Assessment Contact Information' section, which is expanded. It features a 'Begin Date' dropdown menu set to '02/03/2012 12:25 PM'. Below this is a table with columns for Name, Affiliation, Title, and Contact Date. The table contains two rows: 'Jones, Sally' and 'Jones, Tommy', both with a contact date of '02/06/2012 01:00' and radio buttons for AM and PM. Each row has a 'Delete' link. Below the table is an 'Insert' button. At the bottom of the page, there are buttons for 'Options', 'Go', 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'. The browser status bar at the bottom shows 'Done', 'Trusted sites', 'Protected Mode: Off', and a zoom level of 100%.

Name	Affiliation	Title	Contact Date
Jones, Sally			02/06/2012 01:00 <input type="radio"/> AM <input checked="" type="radio"/> PM Delete
Jones, Tommy			02/06/2012 01:00 <input type="radio"/> AM <input checked="" type="radio"/> PM Delete

19. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.